



Saint Xavier

UNIVERSITY

Strategic Plan

Iteration II

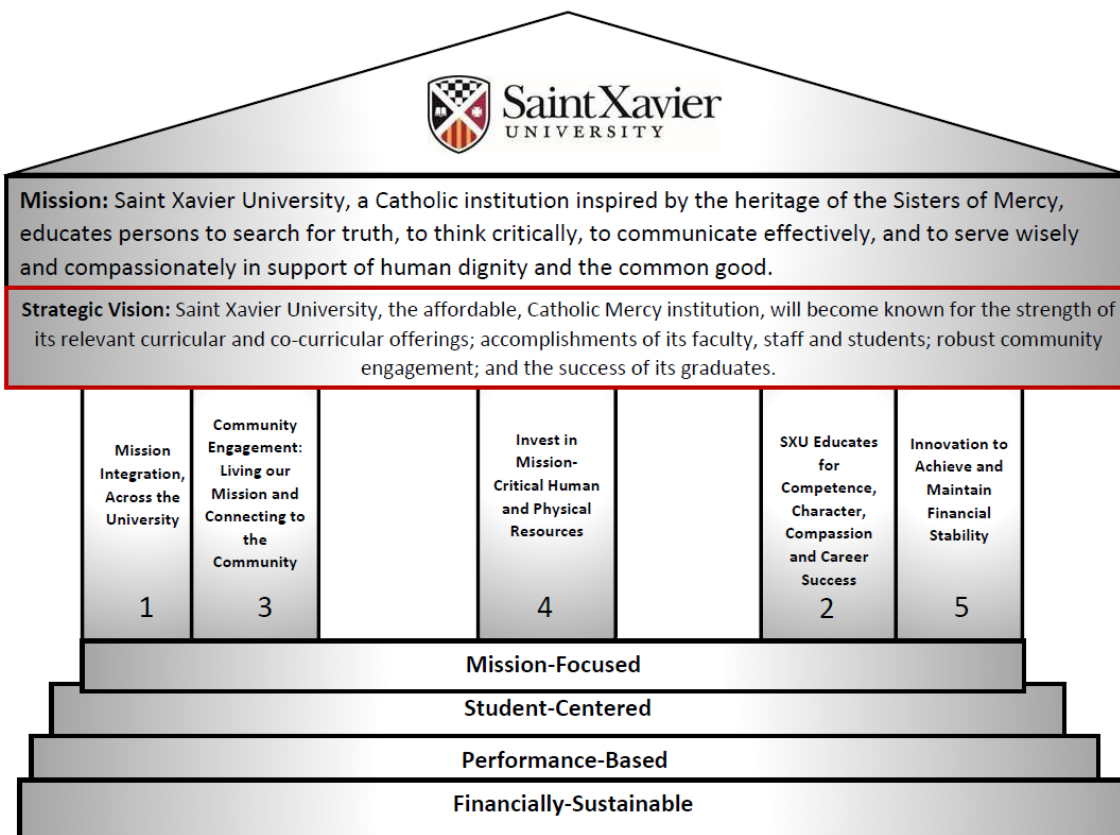
August 2023

Introduction

Saint Xavier University's STRIVE 2025 strategic plan was approved by the Board of Trustees in May of 2019. The document set forth the institution's commitment to being a mission-focused, student-centered, performance-based and financially sustainable organization and then identified the five pillars or promises that Saint Xavier would pursue over the next five years:

- Mission Integration across the University
- SXU educates for competence, character, and career success.
- Community Engagement: Living our Mission and Connecting to Community
- Invest in Mission-Critical Human and Physical Resources
- Innovate to Achieve and Maintain Financial Stability

In the words of the university's president, the plan would serve as a roadmap to the future during a period of transition in higher education with a goal of ensuring that SXU would thrive for another 175 years.



Rev 12-2020

Within months of the Board action, the SXU community began to implement STRIVE 2025 by focusing on the pillars for success, developing action plans, and submitting proposals for startup funding.¹ A five-person core steering committee charged with coordinating the work of five “pillar teams” was appointed, and a first progress report outlining activities completed between February 2020 and February 2021 was published. And then came the pandemic.

Campus communities reassembled following the pandemic to a long list of immediate issues and somber predictions about the future of higher education. The government support that allowed many universities and colleges to weather the health emergency was gone, and the long-foreseen “enrollment cliff” loomed. In the midst of this uncertainty, Saint Xavier’s president convened a small group to review and revise the STRIVE 2025 document.²

2023-2024 Iteration of STRIVE 2025

With publication of this second iteration of STRIVE 2025, the SXU community reaffirms its commitment to the collaborative strategic planning process that was suspended during the pandemic period. This updated version of the document is faithful to the spirit of the original plan, while differing from that document in several important ways.

First, it reflects work undertaken in 2021 to clarify the intent of the pillars and to eliminate areas of overlap.

Second, it places heightened emphasis on scanning the internal and external environment to identify the salient strengths, weaknesses, opportunities and threats present within Saint Xavier and in today’s rapidly changing, complex operating environment.

Finally, this iteration of the SXU plan is less expansive than the first version – a reflection of the foreshortened time span between now and 2025.³ As the university launches the search that will result in the hiring of its next president, the goal is to strengthen the foundation for continued success.

¹ An early recommendation of the working group related to the overlapping nature of the pillars. They suggested that the first and third relating to mission be combined and that the second and fifth also be merged. No formal action was taken on these proposals. In order to eliminate some of this confusion, this iteration of the SXU strategic plan relies upon strategic directions rather than pillars.

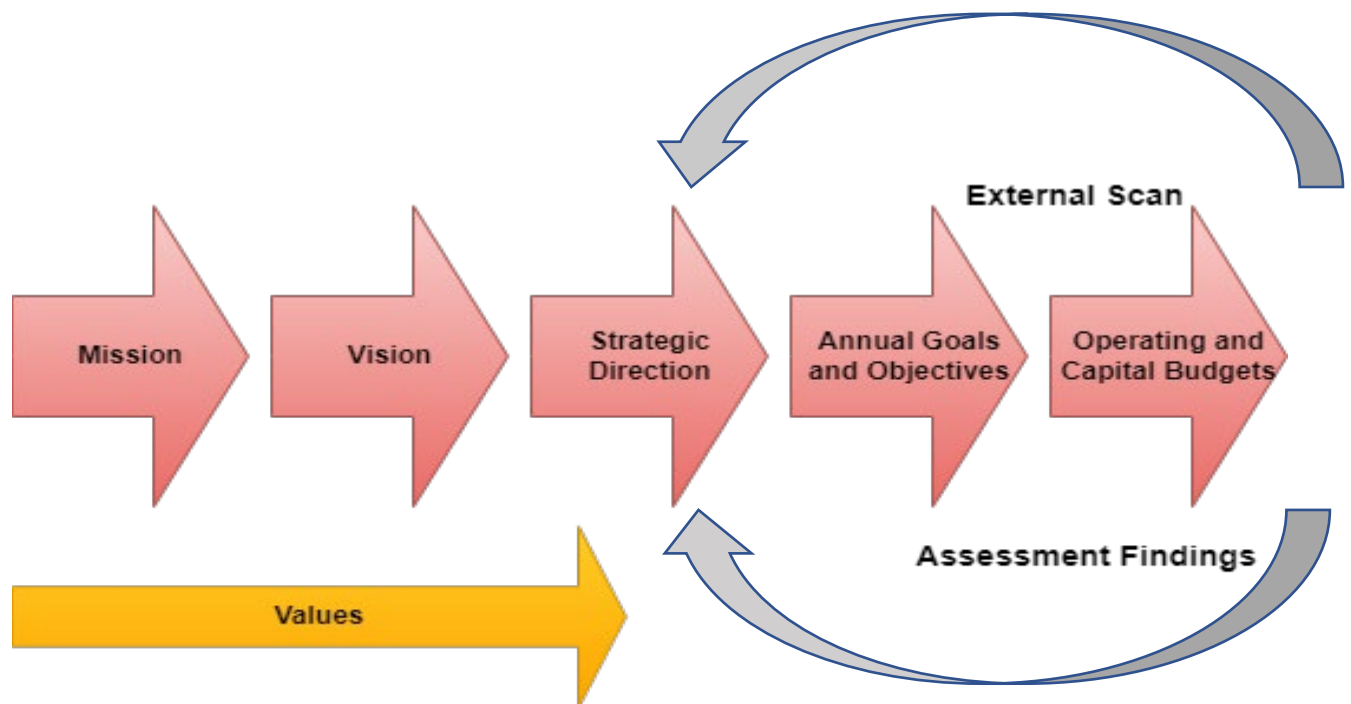
² A formal revision was not published, though preliminary steps were taken to issue a white paper. In general, the group concluded that the years ahead would be challenging for the institution in spite of recent financial gains.

³ The first draft of this second iteration was developed by the university’s interim president, following a review of all prior planning materials, including the data files reviewed in the aftermath of the pandemic. Next steps call for reviewing and revising the draft within the senior leadership team and governance groups representing other stakeholder groups. It will take effect pending approval by the Board of Trustees. It is the intent of the university to share the draft – in its current state – at the time that presidential candidates are identified and interviewed.

Strategic Planning Model

The schematic below illustrates the linkages between various aspects of the planning, budgeting, scanning, and processes at SXU. The work of the university is guided by broad **strategic directions** that flow from a variety of sources.⁴ Attached to each direction are the specific **goals** that SXU intends to accomplish during the planning period. **Annual objectives** operationalize this intent and drive the operating and capital budgets.

The mission, vision and values statements, the charism of the Sisters of Mercy and Catholic intellectual tradition inspire the planning process. Data gathered through internal and external scanning processes inform the institutional culture of continuous improvement and drive the process to iterate strategic directions, goals and objectives. In turn, the annual objectives cause the institution to invest through the operating and capital budgets, always with the purpose of improving the student learning experience.



⁴ The strategic directions are comparable to the pillars in the earlier version of the document. They represent our current best thinking about immediate priorities to be pursued in pursuit of a promising future.

Consistent with the expectations of accreditors and best practices within the industry of higher education, the planning model is designed to achieve the following purposes:

- To define the university's relationships to its environment,
- To align internal strengths with external opportunities,
- To guide decisions regarding the deployment of limited resources,
- To foster a climate of continuous improvement,
- To draw intentionally upon assessment data to improve the quality of the learning experience of students,
- To provide direction for – and constraints upon – future activities, and
- To engage members of the SXU community in dialog about the strategic options available to the university.

This particular iteration of the SXU strategic plan was assembled in draft form by the interim president and refined by members of the senior leadership team before being shared with the university for comment, revision and approval. It will guide the collective work of the Saint Xavier community during the 2023-2024 academic year.

Environmental Scan: Ten Issues

An effective strategic plan is predicated upon continuous scanning of the internal and external environments. Sometimes such information is used to compile an analysis of strengths, weaknesses, opportunities, and threats (SWOT). The summary that follows presents such information in an alternative format, identifying critical issues that Saint Xavier University decision-makers should take into consideration in plotting institutional strategy.

1. Saint Xavier University is dependent upon the effectiveness of its enrollment strategies (recruitment and retention) to sustain itself financially. As the number of high school graduates in Illinois continues to decrease over the next decade, competition for new students will grow ever more pressured. SXU has the good fortune of its prime location in Chicago and its legacy of preparing first-generation students. These are definite assets. Still, although SXU has welcomed large first-year classes in recent years, undergraduate student demographics remain an important consideration.¹ Tuition in 2021 was 52% higher in 2021 than in 2008 . . . and yet net revenue from tuition and fees essentially was the same. This reality makes improved retention important. Each one percent gain in the percentage of first-time freshmen who persist into their sophomore years is worth \$250,000 to the bottom line.

2. One-third of SXU undergraduates have little or no personal or family resources to help pay college tuition and ancillary expenses. Nearly all undergraduates demonstrate financial need and are dependent upon federal, state, and institutional aid to earn their degrees.² Recent increases in the size of MAP and Pell grants have proven beneficial for SXU, helping to reduce student loan dependency. Of course, as dollars from these sources increase, so too the institution's dependency on government funds.

3. This demographic reality means that SXU students may hesitate to enroll and incur the loans necessary to fund the cost of attendance. In recent years, growing percentages of each SXU applicant pools have opted not to attend any college. One quarter of 2021 applicants opted not to matriculate to a university or college – a 10% increase over the pre-pandemic years. On average, students who do graduate leave with

¹ SXU continues to demonstrate the capacity to generate large applicant pools. This is especially important given the comparatively low yield rate the university has in relation to other institutions.

² As Saint Xavier applicants move through the financial aid process, the university relies upon a standard industry-wide methodology to determine how much the students and their families can afford to contribute to the cost of attendance. Approximately one third of applicants are from homes with an estimated family contribution (EFC) of \$100 or less.

over \$28,000 in debt. As the public grows more skeptical about the value of a baccalaureate education, “gap” numbers are important to track.³

As SXU tracks data relating to such concerning variables, it has an opportunity also to celebrate achievements with even greater intentionality. University graduates fare well on the new Economic Mobility Index indicator. This speaks to the value added by the university and should receive significant attention. This may well be one of the best opportunities SXU has to make its case in an intentional and data-driven way. In addition, the university continues to “punch above its weight” in recruitment. Even as the size of the applicant pool shrinks, the number in the freshman class has been growing. University leaders should celebrate but also monitor closely.

4. Demand for some of the university’s largest programs is a function of public policy. Both nursing and education are vulnerable to these changes. The effort on the part of two-year college leaders and sympathetic legislators to gain approval for community colleges to award baccalaureate degrees in nursing and teacher education are prime examples of such threats. Given upward adjustments in MAP and Pell grants, many Illinois students opting for careers in these fields have the option of attending community colleges virtually free of charge.

5. Of course, Saint Xavier also is particularly vulnerable to any changes in state or federal financial aid policy. SXU is among the most Monetary Award Program (MAP) dependent institutions in Illinois and awards almost \$10 million in Pell grants annually. Rumors that the state is considering new MAP formulas that favor students attending public institutions over those opting for independent colleges and universities are important to track closely.⁴

6. Like many small private colleges and universities, SXU relied for a considerable time on revenue generated through its graduate programs to supplement undergraduate net revenue. Since many graduate programs rely upon a limited number of full-time faculty and are heavily dependent upon adjuncts, graduate enrollment essentially supported the undergraduate program. This is not unusual. Some institutions offset their increasing dependence upon graduate revenue by establishing online programs allowing students to blend continued studies with busy personal and professional obligations. SXU does not have a significant online presence.

7. Members of the SXU community can be justifiably proud of the university’s improved financial profile. New policies on managing tuition increases and the institutional discount rate, combined with heightened attention to retiring debt, contributed to these gains as did the difficult decision to cease recognition of a faculty collective bargaining unit and more recent program elimination actions. These necessities, when coupled with modest compensation levels and recent adverse media attention, contribute to a chronic challenge of hiring and retaining good employees. The negative press has been

³Skepticism about the value of a college education is evident on both sides of the political divide. Books such as *The College Scam: How America’s Universities are Bankrupting and Brainwashing Away the Future of America’s Youth* by Charlie Kirk is an example of the negativity found in the popular press.

⁴ At present, for example, federal officials are contemplating changes program criteria to favor families with more than one child in college.

offset partially by the strong historic reputations of some academic and athletic programs. Low salary and wage rates and compression are serious issues for the institution to address as it seeks to attract and retain gifted employees.

8. Like other institutions of higher learning, Saint Xavier is concerned with student academic performance and retention and graduation rates. Of particular concern is student dissatisfaction with the SXU experience. Undergraduate survey data suggest that only half of graduating students would recommend SXU. Some positive initial steps were taken several years ago in relation to service excellence as key stakeholder groups came together to endorse Service Excellence Standards. It will be important to return to this initiative across the university. Students need to experience authentic caring among faculty and staff. Institutional effectiveness data suggest that they are focused particularly on career development. SXU must demonstrate its own commitment to ensuring that graduates are career ready.

9. Across the country, university and college campuses continue to dedicate larger and larger proportions of their operating budgets to non-credit-bearing activities. SXU is no exception. Needs ranging from counseling and health services to campus public safety, academic support services and regulatory compliance require significant expenditures. As SXU grapples with the need for even greater investments in student, faculty and staff success and wellness, **it must cultivate new sources of significant revenue** – from graduate programming to enhanced housing/room/board revenue to fundraising to expanding the business outreach of clinics and built resources. The latter may be a particularly important opportunity to explore, given the institution's location and Sisters of Mercy legacy. In all such instances, decision-makers will want to pay close attention to returns on investment. Already the university has demonstrated its prowess in competing for Department of Education and National Science Foundation grants. The time is right to institutionalize this effort through the establishment of an institutionally funded Sponsored Program Officer position in either academic affairs or student success. As the number of Hispanic Serving Institutions in the Upper Midwest continues to grow, SXU currently has a position of strength.

10. Students continue to be drawn to the campus by a limited number of majors. Some of these growth fields are relatively understaffed with full-time faculty. A high priority for the university is to maintain an appropriate enrollment/staffing balance while honoring tenure and maintaining financial flexibility. SXU is not alone in facing this challenge. A comprehensive staffing/rebalancing effort is warranted.

Summary

Unlike the first iteration of STRIVE 2025, this iteration of the Saint Xavier strategic plan attaches key performance indicators to each of the strategic directions identified in the document. Now, as the university attempts to identify new strategic pathways into the future, it will be especially important to make data-driven decisions throughout the organization. Though many of the issues identified are daunting, very few are unique to Saint Xavier. Like other non-selective, tuition-dependent colleges and universities that serve many first-generation students, SXU must overcome considerable challenges in the years ahead.

Opportunities clearly exist if members of the SXU community are willing to collaborate more effectively with one another and seize upon promising external trends. Unlike many peer institutions, SXU has remained steadfast in pursuit of its Mercy-inspired mission. Opportunities exist to leverage the institution's distinctive demographic exist through the formation of partnerships, the pursuit of innovative and sustainable solutions to complex social problems, and diversification of revenue sources. Though new seasons of difficult decisions likely will materialize in the years ahead – as they have in the past. Still, the mission remains a noble one, capable of inspiring those willing to be moved and engaged.

Strategic Direction I

Saint Xavier University will infuse its distinctive mission, inspired by the heritage and critical concerns of the Sisters of Mercy and the Catholic intellectual tradition, into the curriculum, co-curriculum, institutional operations, and community engagement efforts.

I.A. We will integrate learning opportunities centered on Catholicism, the Catholic intellectual tradition, and the core values and critical concerns of the Sisters of Mercy into the curriculum and co-curriculum.

Design a required general education course that reflects the SXU commitment to educating students about Catholicism, the Catholic intellectual tradition, and the core values and critical concerns of the Sisters of Mercy.

Provide students with high-impact learning experiences that address the critical concerns of the Sisters of Mercy that can be embedded within students/ four-year plans.

I.B. We will recruit, orient, mentor, and evaluate faculty and staff, consistent with our mission, values, and the Mercy Spirit; our dedication to inclusion; and our commitment to service excellence.

Provide regular opportunities for members of the faculty, staff, and student body to participate in DEI and service excellence training and professional development.

Finalize and implement the new faculty hiring guide and pilot recommended processes during the spring 2024 semester.

Invite university community members to complete the Higher Education Research Institution employee satisfaction survey, disseminate findings and communicate plans for improvement.

I.C. We will hold ourselves accountable to high performance expectations through the development and implementation of a consequential annual evaluation process.

Initiate the development of a performance evaluation system that recognizes and rewards significant contributions to the institution's mission and strategic goals.

I.D. We will create and sustain a culture of inclusive excellence across the university.

Develop and implement a Diversity, Equity, and Inclusion (DEI) strategic plan.

Conduct the university's first campus climate survey, communicate findings widely, and develop plans for improvement.

Host Saint Xavier's first DEI Summit and encourage widespread participation in this important event.

Develop new strategies and procedures for resolving student bias complaints.

1.E. We will manifest the Mercy Spirit through meaningful engagement in the community.

Establish a strong new connection between NetVue and Saint Xavier University.

Re-establish the Mercy Leadership Retreat for students in collaboration with other Conference of Mercy Higher Education (CMHE) institutions.

Develop a proposal to host a Eucharistic revival event for the wider community at SXU.

Key Performance Indicators

- Comments/ratings from program participants
- Success of first NetVue proposal and evaluation results
- CMHE findings
- Results of satisfaction inventory and climate survey

Strategic Direction II

Saint Xavier University will foster student engagement, satisfaction, and achievement by educating for character, leadership, and career success.

2.A. We will complete tasks associated with the decisions to reorganize the academic program and to eliminate certain majors and degree programs.

Revise four-year program curriculum plans and learning outcomes as necessary.

Review and revise, as necessary, course descriptions, student handbook, catalog, and website copy.

Support effectively those faculty serving in new and existing leadership roles.

2.B. We will evaluate and renew the general education curriculum, consistent with best practices among peer institutions and our own mission and values.

Evaluate the SXU general education curriculum in the context of the university's mission and values and practices on peer and aspirant campuses.

Recast the undergraduate SXU First-Year Experience to accomplish clear mission-based educational goals.

Budget dollars in 2024-2025 to support more off-campus service projects for first-year students.

2.C. We will assess student engagement, satisfaction, and achievement through the institutional effectiveness and learning outcomes assessment processes and will disseminate findings and strategies for improvement to members of the SXU community.

Consider the costs and benefits of administering the Student Satisfaction Surveys to traditional and adult SXU students.

Conduct a 2023 fall semester pilot program in response to findings of 2022-2023 longitudinal academic study.

Implement the Path to Belonging project, a collaborative effort among Student Life, Student Success, the Center for Inclusive Excellence and Institutional Research and Assessment, track outcomes, and disseminate findings.

Develop a permanent venue on campus for selling SXU spirit wear.

2.D. We will offer students the career development and placement programs needed to compete successfully in today's complex work environment.

Appoint and charge an interdisciplinary task force to examine best practices on comparable campuses and prepare recommendations for SXU to consider.

Develop an instrument to be used to gauge student success and satisfaction within a year of graduation.

Key Performance Indicators

- Pilot study findings/recommendations
- Net promoter score
- Freshman-to-Sophomore Graduation Rate
- 6-Year Graduation Rate
- D/F/W Grade Profile

Strategic Direction III

Saint Xavier University will create a vibrant learning and living environment through investment in the mission-critical human and physical resources necessary to fulfill our mission and our promises to students.

3.A. We will address – in an open and transparent manner – inequities in faculty and staff composition and compensation.

Engage a respected external firm to complete a compensation review for dissemination to key leadership groups, including the Board of Trustees.

Develop and implement new policies for remote and hybrid work at SXU.

3.B. We will invest in information technology as a driver of recruitment, retention, marketing, learning and operations.

Begin the process of migrating crucial functions to the cloud.

Complete an after-action report, including recommendations, regarding the late-summer cyber incident for consideration in the Board of Trustees.

3.C. We will continue to invest in plant improvements to create a 21st-century learning environment.

Develop a phased plan for the expenditure of State of Illinois capital dollars on campus projects.

Appoint and charge a working group to develop a plan to introduce a learning commons concept within the library.

Key Performance Indicators

- Evaluation of remote/hybrid work policy change
- Compensation study findings/recommendations

Strategic Direction IV

Saint Xavier University will enhance its financial and educational position through effective enrollment management strategies, the entrepreneurial development of new sources of support and the prudent management of existing resources.

4.A. We will revitalize university fundraising efforts by filling critical vacancies and developing and implementing a successful comprehensive plan of work for the 2023-2024 academic year.

Re-engage alumni, parents, and friends of SXU through enhanced communication and annual fund solicitation.

Stimulate giving by conducting a successful mini-campaign to secure dollars for improvements to athletic and nursing facilities.

Publish and disseminate widely a calendar year President's Report.

4.B. We will continue to prize efficiency by conducting cost/benefit analyses of select administration and educational functions.

Evaluate existing grant-funded programs and determine plans for continuation, discontinuation, or modification.

Assess the costs and benefits of existing auxiliary operations and implement necessary changes.

4.C. We will manage university resources thoughtfully and prudently.

Complete the process of transitioning dollars invested as endowment to a new manager.

Develop and implement strategies for refinancing existing bonds and securing favorable interest rates.

We will review undergraduate and graduate program offerings to ensure that the university offers an optimal mix of high-quality learning experiences with particular attention to educational quality and financial sustainability.

4.D. We will continue to strengthen the university's reputation in higher education.

Earn positive evaluations from Higher Learning Association readers of the SXU required written report on general education assessment and the shared governance focused team that will visit in 2024.

Secure renewed accreditation for the Graham School from the Association of Advance Collegiate Schools of Business

Complete the required CMHE evaluation process during the spring semester.

Secure a positive accreditation review from the National Association of Schools of Music in March of 2024.

Key Performance Indicators

- Results of various external evaluations/accreditation
- Department of Education Fiscal Health Score
- Forbes Fiscal Grade
- Fundraising Totals